

# UTHSCSA Facilities Management Workflow Guide

Powered by:



**WorkflowGen**

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# Facilities Management Workflow Guide

## Preface

This guide was developed to help UTHSCSA departments electronically submit work requests to Facilities Management via the WorkFlowGen system. The forms will automatically be forwarded to the fund approver selected, and if they approve, it will automatically be forwarded to Facilities Management for action. You will be able to print copies of your requests and monitor their status via your personal WorkFlowGen dashboard. You will also automatically receive emails detailing the actions taken concerning your request.

## Getting Started

To use the Workflow system, you do not need to install any special software. Since it is web based, you must have a web browser such as Internet Explorer or other Web browser that supports JavaScript. You also will need Adobe Reader 9.0 or later which is already installed on most UTHSCSA personal computers. If you do not have Adobe Reader 9.0 or later, you can download the latest version from [here](#).

WorkFlowGen **may not** work with earlier versions of Adobe Reader (less than **9.0**) because of security issues discovered in January 2007 by Adobe and Microsoft.

To launch a work request visit our web site at:  
<http://www.uthscsa.edu/facilities/reqwork.html>

Select the appropriate form by clicking on the WFG icon. There are four different types of Facilities Management Work Requests. Be sure to read the explanations contained in our web site,

You must have a valid UTHSCSA username to log on. Enter `uthscsa\your_username` (substitute your actual user name) and enter your UTHSCSA password.



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You should see an Adobe PDF form that must be completed by the requestor.

The screenshot shows a web browser window titled "WorkflowGen - Workflow portal - Microsoft Internet Explorer". The address bar shows "http://aramis.uthscsa.edu/scripts/wfgen/pro/user/Show.asp". The page content includes a navigation bar with "Home | DEPT\_FUNDED\_WR #1954 > 1-REQUESTOR | Data | Help | Graphical follow-up". The main content area is a PDF form titled "Facilities Management Request for Department Funded Work" with a WFG# of 1954. A note explains the form's purpose and provides contact information. A "Check to Cancel Request" checkbox is present. A "Submit Form" button is highlighted. The form includes a table for "Requestor's Information" and a section for "Description of Work Needed" with dropdown menus for Campus, Building Name, and Room, Floor, Etc.

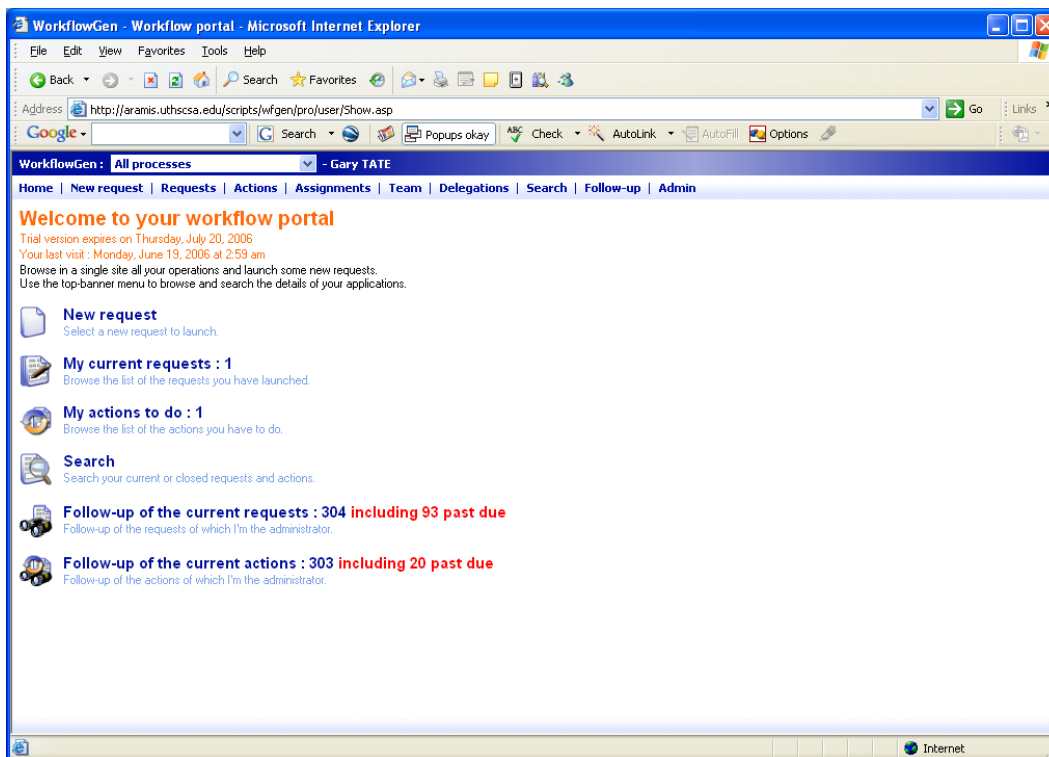
Requestor's Information			
Last Name	Tate	First Name	Gary
Email	tateg@uthscsa.edu	Phone #	210/567-2880
Department Name		Project ID	
Formal Estimate Required?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	Expiration Date
Description of Work Needed:			Approver's Name
Campus	Select...	Building Name	Select...
Room, Floor, Etc			

Most of the information is already filled out for you (such as name, date, email, etc.) If you are requesting work that requires department fund, enter the six digit PeopleSoft Project ID in the field labeled Project ID and then press your <Enter> key. After a second or two, the Dept ID field and the Expiration Date fields will automatically be populated. Below them is a dropdown box labeled Approver's Name. Use the dropdown arrow and choose who you want the request to be sent to electronically for approval. Fill out any other information needed to describe the work being requested. Fields with a "blue" box around them can have data entered into them. If the field has a "red" box around it, it must be completed. If you submit a form without a required field completed, it will automatically be returned to you until you complete the required field. If for some reason you have chosen the wrong form, or do not want to complete the request, check the "Check to Cancel Request" box and then click the "Submit Form" button. Your request will be canceled and no further action is necessary.

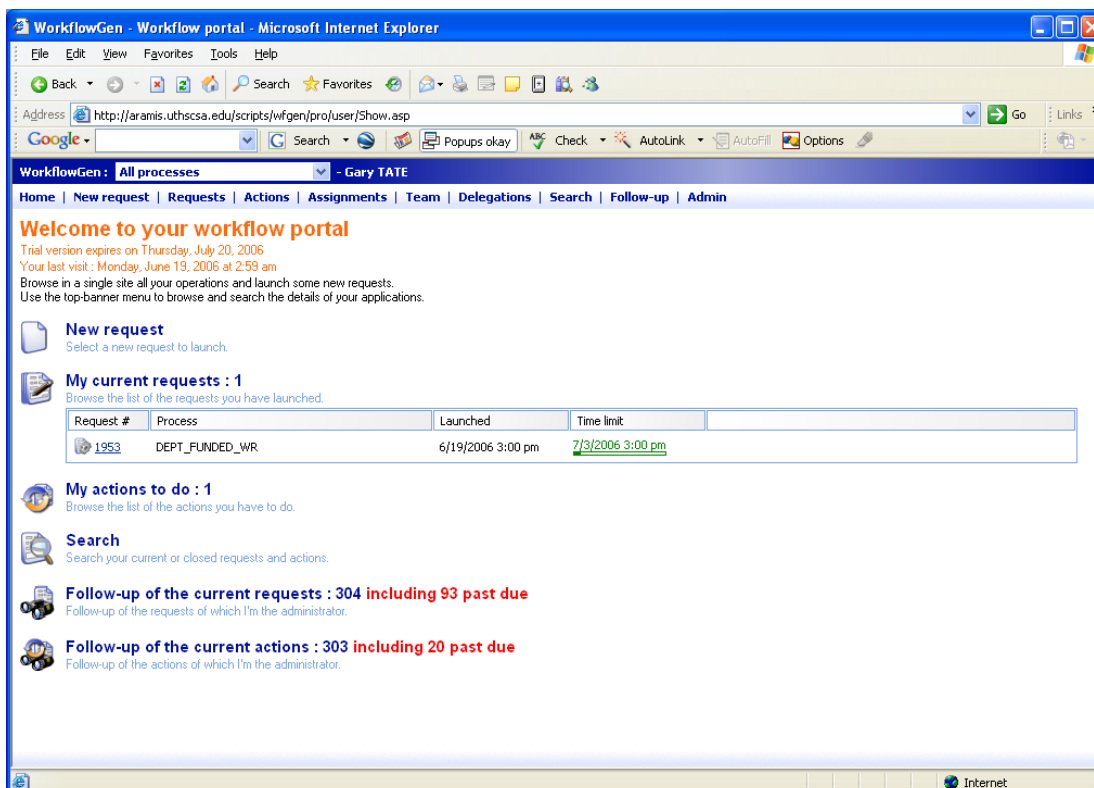
Once you have completed the form to your satisfaction, press the Submit Button. The request will automatically be sent to the Approver with an email alerting them that they have a workflow action to perform. The Approver will have three workdays to approve, disapprove, or send it back to you for more information. If three workdays elapse without the Approver taking action, the request will electronically be returned to you. You may either resubmit the request, or choose another Approver. If you submit the form without choosing an Approver, the form will be electronically returned to you.

You may monitor the status of your requests or launch new ones by going to <http://workflow.uthscsa.edu/wfgen/pro/user/>. This will become your personal dashboard and will contain the status and results of all of your requests. You may want to make a shortcut or add this to your Internet Explorer Favorites as you will visit the site often.

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By clicking on the appropriate tabs, you can see all of your current requests, any actions that you need to do, search for past actions, or even launch a new request.



This panel shows one current request - WFG# 1953. If you click on the WFG number, you will see:



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### **What happens to requests sent to me for approval or action when I am out of the office?**

If you have been selected as an approver and you have not taken action within three days, the request is automatically returned to the requestor. It's important to send the requests to someone that you know will be available to approve it within three work days. The request can not be recalled and will be automatically returned to you to choose another approver.

### **Things to Remember**

- Be sure you have filled out your form correctly before clicking on the "Submit Button". You can not change or recall the form once it has been submitted.
- You may close your form before submitting it and your information will be saved. (It is closed by clicking on the red box with the white X at the top of your browser window.) You can reopen your request by going to your personal dashboard and reopening the request.
- Area of the form with "blue" boxes around them can be updated. Areas with "red" boxes must be updated. All other areas of the form are "protected" and you may not change them.
- You can always see exactly where your request is in the process by going to your dashboard.
- If you begin a request and don't send it to anyone in 10 workdays, it will automatically cancel itself.
- If the approver you selected does not take action in three workdays, the form will be returned to you so you may take the necessary action to get your request approved.
- You will automatically receive emails indicating what is happening to your request. You can not reply to these emails since they are not coming from a person - they are being generated by a software program.
- If you have questions about filling out the forms, please call 210-567-2880. If you have technical problems with form, please call 210-567-2887.

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### **FAQ - Frequently Asked Questions**

**I can open the form but the program will not allow me to type in information.**

This is a common problem if your Adobe Reader version is less than 9.0. You will need to download and install the latest version of Adobe Reader. It can be found [here](#). If you have difficulties installing the software, please contact your Department TSR.

**Can I cancel the request before I submit it?**

Yes, just check the "Cancel Box" and then click on the "Submit Button". Your request will be deleted.

**Can I cancel the request after it is submitted?**

No, either the Approver or Facilities Management will have to disapprove it.

**What if I want to change something after I submit it?**

Either the Approver or Facilities Management can return the form to you for changes as long as the request has not been closed.

**How do I save the form if I have not completed it and want to finish it later?**

Just close the window by clicking on the "X" in the upper right corner of your browser. You can then go to your personal WorkFlowGen dashboard later and reopen and complete the form.

**What happens if I do not send my request to an approver?**

You have 10 workdays to submit the form before it is automatically cancelled. This prevents the workflow system from filling up with unwanted requests that should be deleted.

**What happens if the system "crashes" while I am in the middle of something?**

You can always go to your personal WorkFlowGen dashboard and reopen the form usually without the loss of data.

**What happens if the Approver that I choose is not responsive?**

The Approver has three work days to take action. After this time, the request is automatically returned to you. You may either resend it or choose another Approver.

**Why can't I change my name, email, phone number, etc. that is already in the form?**

We must maintain an audit trail of who has acted on the form. This information is automatically captured from your UTHSCSA logon account. If there is a problem, please get with Computing Resources to change your data.

**What happens if I forget to include a PeopleSoft Project ID or an Approver?**

The request will automatically be returned to you until you select an account and an Approver.

**Why do some forms have a "red" box around them?**

These fields are required. For example, if you do not choose a "Campus", WorkFlowGen does not know where to send your request since the campuses at Laredo, Harlingen, and Edinburg are also using the system. The workflow processes are different depending upon the campus location. If you do not choose a required field, the form will be electronically returned to you.

**Can I change who receives the emails confirming approval, completion, etc.?**

No - however, you may forward a copy of your email to them for informational purposes.

**Why can't I choose someone other than those located in the "Approver" dropdown list?**

It is HSC policy that only certain individuals may obligate funds. The HSC PeopleSoft system maintains this list and the WorkFlowGen system relies on this list. If you feel someone else should be able to approve requests, please contact your department ACE and have that person setup as a PeopleSoft Project Manager. After this has been done, the new person's name will appear in the dropdown list.

**How can I tell what actions are needed of me and what is the status of my requests?**

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You can go to your WorkFlowGen personal dashboard and view what needs to be done. Actions that need to be done by you will be listed the “My Actions to Do” box. You may also search for past requests as well as actions that are still open. The “graphical” views are a good way to see exactly where your request is located in a complicated workflow.

**I got an error and the process “crashed” when I was filling out a request. What do I do?**

As of the time of writing this guide, there are some technical issues with the Adobe form accessing the data in PeopleSoft. Occasionally, when you choose the Approver from the dropdown list or go back and change the Project ID after the Approver was selected, the form will crash. We are addressing the issue. However, as soon as you open a form, WorkFlowGen saves a copy of your form and places it in your personal dashboard. If you experience a “crash”, return to your personal dash board, and the form that you were working on will be listed in the “My Actions to Do” box with the action “Initiate” being needed. Go ahead and complete the form and send it to the Approver.

**My request was returned to me for more information. Why does it have to be approved again by the fund Approver if they have already approved the request?**

The form must be re-approved because the funding source for the request may have changed since the Approver last saw the request.

**Where is “my personal dashboard”?**

Go to <http://workflow.uthscsa.edu/wfgen/pro/user/> and log in using UTHSCSA\ and your NT Username. If you have actions that you need to do or want to view past actions, you will see them listed there. If you will be using WorkFlowGen frequently, you may want to create a short cut or save the link in your Favorites in internet explorer. See your department TSR if you need help doing this.